

**U. S. DEPARTMENT OF AGRICULTURE  
FOREST SERVICE**

**TONGASS NATIONAL FOREST**

**KETCHIKAN – MISTY FIORDS RANGER DISTRICT  
PROSPECTUS AND REQUEST FOR PROPOSAL**

**INVITATION FOR PROPOSALS FOR PERMITS TO CONDUCT  
OUTFITTED/GUIDED SERVICES AT MARGARET CREEK WILDLIFE  
OBSERVATION SITE**

Issued by: Ketchikan-Misty Fiords Ranger District  
Date: January 28<sup>th</sup>, 2013  
Location: Ketchikan, Alaska

Sealed proposals will be accepted by:  
**District Ranger,**  
**Ketchikan-Misty Fiords Ranger District,**  
**3031 Tongass Avenue,**  
**Ketchikan, Alaska, 99901,**  
until 4:30 p.m., Alaska Daylight Time,  
March 29<sup>th</sup>, 2013

For Information:  
Contact Jeffrey DeFreest, District Ranger  
or Reid Parker, Special Uses, at (907) 225-2148 or [rparker@fs.fed.us](mailto:rparker@fs.fed.us),  
between 8:00 a.m. and 4:30 p.m., Monday through Friday.

## **TABLE OF CONTENTS**

<u>Title</u>	<u>Page</u>
I. Introduction	1
II. General Information	2
III. Offering	
IV. Special Conditions	5
V. Evaluation Criteria — Selection of Successful Applicants	6
VI. Instructions: How to Submit Proposals	9
Application Form	10
 <u>Evaluation Criteria Forms</u>	
Form A: Kind of services offered and charges to the public.	11
Form B: Ability to provide a safe outfitted/guided experience for visitors	12
Form C: Experience and qualifications of applicant	13
Form D: Sustainable Economics/Local Community	14
Panel Instructions	16

## **APPENDICES**

APPENDIX A - Location Map

APPENDIX B - Sample Special Use Permit (Form FS 2700-4i)

APPENDIX C - Ketchikan-Misty Fiords Ranger District Outfitter/Guide Operating Plan

APPENDIX D- Alaska Region Outfitter/Guide Performance Evaluation

APPENDIX E- Financial Statement, Form FS 6500-24

## **PROSPECTUS FOR OUTFITTED/GUIDED SERVICES AT MARGARET CREEK WILDLIFE OBSERVATION SITE**

### **KETCHIKAN – MISTY FIORDS RANGER DISTRICT, TONGASS NATIONAL FOREST**

#### **I. INTRODUCTION**

The Tongass National Forest, Ketchikan-Misty Fiords Ranger District (KMRD), is soliciting proposals from interested parties to provide commercial outfitter and guide services at Margaret Creek Wildlife Observation Site. This prospectus updates and supersedes an initial prospectus completed in 2005. The district intends to authorize up to 2,339 service days to up six floatplane-based operators and ten boat-based operators as a result of this offering. Implementation of this prospectus is scheduled for the 2014 operating season.

Since implementation of the 2005 Margaret Creek prospectus, additional applicants have contacted the KMRD requesting to provide services at Margaret Creek. This demonstration of additional competitive interest requires the issuance of a new prospectus and evaluation of offers to determine how the available service days will be allocated among competing applicants.

This prospectus is intended to solicit proposals from interested parties who intend to provide commercial wildlife viewing at Margaret Creek (see Appendix A: Area Map). The purpose of this prospectus is to allocate service days to commercial users, allow for a more satisfying experience for site visitors, and reduce visitor impacts on the bears using Margaret Creek.

The objectives in providing these commercial opportunities are to:

- Provide additional opportunities for Southeast Alaska's visitors to view fish and wildlife in a natural setting;
- reduce visitor impacts to the wildlife using Margaret Creek; and
- ensure that the recreational and natural resource values are maintained and available for unguided as well as guided visitors.

Applicants will be evaluated based on demonstrated ability to meet these objectives.

Permit holders are agents of the Forest Service that provide services to the public, protect health and safety, and help the Forest Service attain management objectives.

Service days awarded by this prospectus will be authorized through priority use service days. Applicants with existing special use permits on the Tongass National Forest will receive five-year priority use permits. Applicants who are not currently authorized to provide outfitter and guide services on Tongass National Forest will be issued a two-year priority use permit. Satisfactory performance at the completion of the initial two-year period will result in an extension to complete the five years. The authorized officer for this prospectus is the District Ranger. Depending on future competitive interest, the term of this prospectus is expected to be 5-10 years.

Prospective applicants are advised to read this prospectus and sample special use permit (see Appendix B: Sample Special Use Permit FS-2700-4i) carefully. There are a number of operational and insurance requirements with which applicants must comply. The Forest Service

reserves the right to reject any and all applications if the applications do not best serve the needs of the public.

All applicants must submit, in writing, a proposal that includes the information listed under section VI. SUBMITTING THE PROPOSAL.

Processing and monitoring of applications is subject to cost recovery under 36 CFR 251.58. Forest Service regulations require applicants for, and holders of, the special use permit to pay a fee for processing applications and monitoring authorizations. Normal administration of outfitter and guide permits is generally exempt from cost recovery. However, due to the extensive analysis required to complete this process, cost recovery will be applied. **Applicants to this prospectus will be billed proportionally to the total number of service days requested at the completion of the application period.**

## **II. GENERAL INFORMATION**

Margaret Creek is a wildlife-viewing site located 25 air miles north of Ketchikan, Alaska. Site facilities include a small viewing platform with blind overlooking a fish ladder, a ¼-mile ADA-accessible gravel access trail, public outhouse, a one-mile gravel road and a public boat/plane float on saltwater in Margaret Bay. Additionally, permit holders may take clients to the upper bridge at the outlet of Margaret Lake. Permit holders may leave a vehicle onsite for the sole purpose of transporting clients from the dock to the viewing site.

In 1989, the Forest Service constructed a fish ladder at the site and from that point until 1998 the site was visited infrequently by locals, loggers, and Forest Service staff. A local tour operator in Ketchikan approached the Forest Service and requested a review of the site for potential tourism developments. The viewing platform was constructed later in 1998.

Since 1999, guided and unguided users have visited Margaret Creek each year to watch black bears feed on four species of salmon during the peak of the salmon run (late July through mid-September). The 2005 prospectus allocated 3,112 service days to six operators, five of which access the site via floatplane and one that accesses the site via motorized boat. Since 2007, annual use has declined to 1,200-1,500 service days used annually and additional service days are now available. In 2012, 1,573 of 2,122 authorized service days were used by commercial operators, representing the highest annual use in the previous 5 years.

The Ketchikan-Misty Fiords Ranger District Outfitter and Guide Management Plan, completed in 2012, allocated 2,752 service days for total commercial use in the Margaret Bay Use Area (Appendix A: Area Map). Of the total area capacity, 85% or **2,339 service days will be allocated** as a result of this prospectus. A site-specific capacity analysis has been completed, resulting in a capacity of 72 visitors total per day during the season of July 15 through September 20.

**Definitions:** The following terms and definitions will be helpful in reviewing the information presented in this prospectus.

Authorized Officer – Line Officer responsible for signing a permit. This is the District Ranger on the Ketchikan-Misty Fiords Ranger District.

Permit Holder - An applicant who has received a special use authorization to conduct outfitting or guiding activities.

Priority Use - The assignment of service days may be classified as priority use if the permit holder has a two-year record of acceptable performance as a holder of a permit for an outfitting and guiding operation similar to the proposed use. The amount of priority use may be adjusted if capacity is available after the initial five years based on the highest use during the previous five-year period (plus 25% up to 1,000 service days/15% over 1,000 service days).

When a permit with priority use terminates, the permit is subject to renewal without competition. **The renewal is at the sole discretion of the authorized officer.**

Service Day - A day or any part of a day on National Forest System lands for which an outfitter/guide provides goods or services, including transportation, to a client.

Special Use Permit/Special Use Authorization- The terms used interchangeably for the authorization to conduct commercial activities on National Forest System lands. A Special Use Authorization is not a contract. It is permissive in nature and is not saleable, transferable or assignable in whole or part. Special Use Authorizations are enforceable under 36 CFR 261.1. (Appendix B: Sample Special Use Permit FS-2700-4i)

Temporary Use - An amount of use (in service days) assigned the holder of a permit with a period of one season or less.

## **B. Successful Applicants - Issuance of Permits**

Selection of successful applicants is anticipated by July 1<sup>st</sup>, 2013. Successful applicants will be issued special use permits as follows:

1. All use assigned to successful applicants will be non-competitive during the life of this offering which is initially a 5-year period (2014-2018). If operating conditions have not changed significantly, a second 5-year period, 2019-2023, may be covered by this prospectus.
2. Successful applicants who are **not** existing Tongass National Forest priority use or transitional priority use permitted operators will receive the service days as priority use for two years. After two consecutive years of successful performance, the permit will be extended to cover the remaining three years (2016 - 2018) of these offerings. **The issuance of priority use is at the sole discretion of the authorized officer.**

## **C. Management Direction**

Specific management criteria, as developed within the Ketchikan-Misty Fiords Outfitter and Guide Management Plan, 2004 Margaret Creek carrying capacity, 2008 Tongass Land and Resource Management Plan, and Forest Service regulations, policies, and direction will be followed in reviewing all proposals. Copies of these documents may be obtained at the Ketchikan – Misty Fiords Ranger District Office, 3031 Tongass Avenue, Ketchikan, AK, 99901, or online via:

Tongass Land and Resource Management Plan

<http://www.fs.usda.gov/detail/tongass/landmanagement/planning/?cid=stelprdb5402695>

Ketchikan-Misty Fiords Outfitter and Guide Management Plan  
[http://www.fs.fed.us/nepa/nepa\\_project\\_exp.php?project=32817](http://www.fs.fed.us/nepa/nepa_project_exp.php?project=32817)

### III. OFFERINGS

These offerings will provide successful applicants the opportunity to provide outfitter and guide services at the Margaret Creek Wildlife Observation Site. Barrage

#### A. Fees

The minimum fee for any outfitter/guide special-use authorization for 2014 will be around \$106.00.

There are three separate costs that each applicant could incur as a result of applying for this prospectus:

1. **Cost Recovery Fee**- This is an application fee charged per service day requested in this prospectus. The Forest Service is required to assess cost recovery fees to recover the agency's processing costs for special use applications as well as monitoring of authorizations, subject to the requirements and limitations set out at 36 CFR 251.58.

At the completion of the application period, the total prospectus cost of xxxxxx will be divided by the total number of days applied for in order to determine the application fee per service day. You will be issued a bill for collection in the amount of the fee per service day multiplied by the number of service days for which you have applied. The minimum cost recovery fee application processing will be \$100.

Your bill must be paid within the 30-day billing period to be eligible for service days awarded by this prospectus.

2. **Service Day Fee** – This is the “flat fee” required for providing outfitter/guide services that include remote-setting wildlife viewing opportunities at developed sites. This fee is currently \$5.24 per service day for 2013 (FS Handbook 2709.11, R-10 Supplement 2709.11-2012-1). Annually, the Implicit Price Deflator-Gross National Product is applied to the flat fee, which may result in increased fees. The permit holder is required to pay this fee prior to use each season. A refund or credit will be given for service days not utilized during the operating season.
3. **Assigned Site Fee** – This is the fee required to store a vehicle or equipment on site. The assigned site for 2013 is \$200. Triennially, the Implicit Price Deflator-Gross National Product is applied to the flat fee, which will result in increased fees for 2014.

#### B. Available Service Days

Capacity limits for use at Margaret were set in the Capacity Analysis for Margaret Creek Wildlife Observation Site. The daily capacity was set at 72 visitors, of which 48 may be guided. The annual capacity for the Margaret Bay Use Area is 2,752 service days, as analyzed in the 2012 KMRD Outfitter and Guide Management Plan. The majority of service days, 85% or 2,339, will be allocated for priority use from this prospectus. The remaining fifteen percent of service days in the use area are available non-competitively. Ten percent will be available for non-wildlife viewing activities including guided fishing. The remaining five percent will be

available for wildlife viewing by temporary use. The remaining daily site capacity of 24 visitor days is available to the general public to use on a casual basis.

### **C. Allocation of Guided Service Days**

Guided tour opportunities at the Margaret Creek Wildlife Observation Site will be competitively awarded in the following manner.

1. Up to six (6) floatplane-based operators and up to ten (ten) boat-based operators may be awarded use through this prospectus. Service days will be awarded on an annual basis for use at any time during the year.
2. Operators awarded less than 500 service days may bring up to 12 clients per day in a maximum of 2 groups per day. Operators awarded 500 or more service days may bring up to 24 clients per day in a maximum of 4 groups per day.
3. Each applicant may apply for the maximum available allocation, **but applicants are encouraged to apply for only the use they would realistically use.**
4. Should a holder of a permit cease operations or if the permit is revoked for any reason, other existing holders would be eligible to apply for additional service days in proportion to the original award for the remainder of the prospectus term. For example, an operator who receives 10% of the initial total allocation would be eligible for 10% of service days returned. Holders who receive less than 1% initially would be eligible for 1%. Any remaining days would become part of the temporary use pool.

The number of successful applicants will be based upon the overall qualifications of the applicants as ranked according to the evaluation criteria found in Section V: EVALUATION CRITERIA.

### **D. Margaret Permit Special Stipulations**

1. Outfitters/guides will include bear safety education in their safety briefings. Information provided will include basic bear biology and behavior, how to avoid confrontations, viewing distances, and what to do in case of an encounter.
2. All visitors and guides will remain on Forest Service developments, including constructed and maintained roads, trails, and the viewing platform.
3. All visitors and guides will remain on the viewing platform except during transit along the trail; no stalking or chasing bears along the trail is allowed.
4. Vehicles used by outfitters and guides are only permitted on FS road 8000495 and FS Road 8000000 as identified in the Motor Vehicle Use Map ([http://www.fs.fed.us/r10/tongass/MVUM/KetchikanMisty\\_RD\\_2012.pdf](http://www.fs.fed.us/r10/tongass/MVUM/KetchikanMisty_RD_2012.pdf)). Use of FS Road 8040000 (accessing “the lower bridge”) is not authorized. Vehicles will stay on established travel routes and pull-out areas at all times to avoid the spread of non-native species.
5. Air carriers will avoid buzzing the Margaret Creek drainage.
6. Guided use is only authorized between the hours of 0800 and 1800.
7. Group size is limited to 12 persons at one time (not including guides). Maximum of one guide per group.
8. Vehicles will not block the roadway and/or trailhead to vehicle and pedestrian traffic.

9. No food will be brought to the viewing area. Food will remain in the airplane or vehicle.
10. Use of the dock is non-exclusive. Operators must have a guide with their clients at all times and pilots will remain with their planes during tours.
11. Guided hunting is prohibited in the Margaret Bay Use Area.
12. No smoking by guides or visitors on the trail or platform.

#### **IV. SPECIAL CONDITIONS**

##### **A. Insurance Requirements**

1. Insurance coverage for outfitting/guiding activities shall be Comprehensive General Liability. The minimum coverage for outfitter and guide activities shall be \$300,000 combined single limit (CSL) per occurrence with the following exceptions.

- a. If defense costs are included within the liability limits of the insured, the minimum coverage shall be increased to \$500,000.
- b. If the authorized activity is van or bus transportation, or river or lake trips, which has a party size greater than 13 people, the minimum coverage shall be \$500,000 CSL.
- c. If the authorized activity involves transportation by aircraft, the minimum coverage shall be \$2,000,000 CSL.
- d. Holders must name the U.S. Government as “additional insured.”

The holder must provide an authenticated copy of its insurance policy to the Forest Service upon issuance of the policy. The policy must also contain a specific provision or rider to the effect that the policy shall not be cancelled or its provisions changed or deleted before thirty (30) days written notice to the Authorized Officer.

Prospective bidders should note that future analysis of risk for outfitting and guiding activities may result in increased minimum insurance coverage amounts for authorized holders.

##### **B. Use Records and Financial Information**

1. The permit holder will annually furnish the Ketchikan – Misty Fiords Ranger District with the number of service days, dates of each guided group, client charges, and any other information as requested. The Forest Service will provide permit holders with copies of the use record and operating plan forms that will be used for reporting the requested information.
2. Use reports must be submitted no later than 30 days after the close of their operating season, or prior to November 1 of each year, whichever comes first. The holder must certify the report as complete and accurate. Failure to submit timely use reports may lead to an unacceptable performance evaluation and may be cause for revocation of the holders special use permit.

##### **C. Performance Evaluations**

Permit holders will be subject to performance evaluations. At a minimum, the Forest Service will perform a year-end performance evaluation at the close of the operating season (Appendix **xx**: Alaska Region Outfitter/Guide Performance Evaluation). An unsatisfactory rating may be cause for suspension or revocation of the special use authorization. Sustained satisfactory



performance is required for a permit extension.

The Forest Service reserves the right to conduct field inspections on authorized operations at any time.

## **V. EVALUATION CRITERIA - SELECTION OF SUCCESSFUL APPLICANTS**

### **A. Criteria**

Proposals received in response to this prospectus will be evaluated by a panel of Forest Service and Alaska Department of Fish and Game employees using the evaluation criteria listed herein. The panel will be largely comprised of staff from other offices who are unfamiliar with your operation. Therefore, panel's ratings will be based on, to the greatest extent possible, the application material and responses to the evaluation criteria. Applicants will be ranked according to the score assigned by the evaluation group.

The objective of this invitation is to select the applicant(s) whose proposal best protects the resource while serving the public need for high quality recreation experiences.

Applicants must provide written responses to the Selection Criteria listed under this section. Failure to provide adequate information for each of the criteria may result in a lower rating for the applicant.

The evaluation panel will make recommendations to the Authorized Officer as to which applicants offer the best value to the public and the government while protecting the resource. The Authorized Officer will make any and/or all selection decisions. All applicants will be notified of the successful applicants by certified mail.

The following evaluation criteria categories are listed below in descending order of importance. Be thorough in describing your personal and/or company history and background. You may include any additional information you feel is pertinent for the evaluation criteria.

### **B. Selection Criteria**

This list includes the criteria categories. The full list of criteria can be found on pages 14-17.

#### **Criteria 1 -- Services Offered to Customers**

Please provide information regarding the services you will be providing. The following information is not all-inclusive. Please add any information to your response that you feel is pertinent to the evaluation criteria. We will be looking for a range of services being offered to the public.

#### **Criteria 2- Ability to Provide a Safe Outfitted or Guided Experience to Visitors**

Please provide a description of your background, training, and experience in providing safe guided

tours.

### Criteria 3 - Experience and Qualifications of Applicant

Provide a description of your experience as a guide. Emphasis should be on experience in Ketchikan or similar conditions. Specifically describe your experience guiding wildlife viewing tours. Discuss your knowledge of local conditions and standards for operating on National Forest System lands.

### Criteria 4 – Sustainable Economics/Local Economy

Describe how your business supports the local economy of the Ketchikan/Southern Southeast Alaska area.

### Criteria 5 – Financial Capability

Applicants must complete the attached Financial Statement, Form FS 6500-24, (Appendix A) providing the past three (or most recent) years of financial history.

## C. Proposed Operating Plan

As part of the application package, applicants must submit a proposed annual operating plan utilizing the *Ketchikan-Misty Fiords Ranger District Outfitter/Guide Operating Plan* (Appendix C). Applicants are encouraged to organize their plans utilizing their responses to the selection criteria outlined in the previous section. Any successful applicant's proposed operating plan will be attached to and become part of the special use permit.

## D. Post Selection Requirements

Once an applicant has been selected, the following information must be submitted and approved by the Forest Service prior to issuance of a special use permit:

- A final operating plan containing all required and optional items.
- Documentation of required liability insurance and, if applicable, property insurance.
- A state business license and any other required federal, state, or local certifications or licenses.

## VI. INSTRUCTIONS - HOW TO SUBMIT PROPOSALS

### A. Instructions for submitting applications

All proposals must be submitted in writing to:

Jeffrey DeFreest  
Attention: Margaret Creek Prospectus Proposal  
Ketchikan – Misty Fiords Ranger District  
3031 Tongass Avenue

Ketchikan, AK 99901

**All proposals must be received by 4:30 p.m., Alaska Daylight Time, March 29, 2013.**  
**Postmarks are not honored. Each proposal must:**

- Be submitted in a sealed envelope.
- Have the name and address of the applicant on the outside of the envelope.
- Have "Margaret Creek Prospectus Proposal" clearly marked on the envelope.
- All applications must be signed. The person signing for an entity must have the authority to sign for that entity. Applicants must include their address, telephone number, and email address.
- Contain all of the required documents.
- Be sent certified or registered mail, return receipt requested, if sent by mail. Late proposals will NOT be accepted and will be returned to the applicant.

Applicants must submit **one original and four copies** of their application package and supporting documents.

Corporations also must include:

- Evidence of incorporation and good standing
- If reasonably obtainable, the name and address of each shareholder owning 3% or more of the corporation's shares and the number and percentage of any class of voting shares that each shareholder is authorized to vote.
- The name and address of each affiliate of the corporation.
- If an affiliate is controlled by the corporation, the number of shares and the percentage of any class of voting stock of the affiliate owned, directly or indirectly, by the corporation
- If an affiliate controls the corporation, the number of shares and the percentage of any class of voting stock of the corporation owned, directly or indirectly, by the affiliate.

Partnerships, limited liability companies (LLCs), associations, or other unincorporated entities must submit a certified copy of the partnership agreement or other documentation establishing the entity or a certificate of good standing under the laws of the state where the entity is based.

## **B. Application Package Requirements**

Application must be in writing and must include or address the following components:

- A signed cover sheet
- A proposed operating plan that includes the required and optional services
- Selection criteria responses, as well as all supplemental materials requested in this section

## **C. General Requirements**

1. All applicants have an equal opportunity to apply. Except for members of Congress, Resident Commissioners, and current Forest Service employees, any individual or entity may apply.

2. The Forest Service does not guarantee a profitable operation. Rather, applicants are responsible for reviewing the prospectus and making their own determination concerning business viability.
3. The Forest Service will select applications that offer the best value to the Government. The Forest Service reserves the right to select the successful applicant based on a trade-off between the fee to the Government and technical merit.
4. The Forest Service is not obligated to accept the application with the highest return to the government.
5. The Forest Service reserves the right to select the successful applicant based solely on the initial application, without written or oral discussions.
6. The Forest Service reserves the right to reject any or all applications and to rescind the prospectus at any time before a special use permit is issued.
7. Any oral statements made by a representative of the Forest Service shall not modify the requirements of this prospectus. If it is determined that an error or omission has been made or additional information is required, a written amendment will be made available.
8. If there is a conflict between the terms of the prospectus and the special use permit, the terms of the permit will control.
9. Each bidder warrants that no person or selling agency has been employed or retained to solicit or secure acceptance of his or her bid under this invitation upon an agreement or understanding for a commission, percentage, brokerage, or contingent fee except a bona fide employee or bona fide established commercial selling agency maintained by this applicant for the purpose of doing business. For breach of warranty, the Government shall have the right to annul any award under this invitation without liability, or at its option to recover from the applicant the amount of such commission, percentage, brokerage or contingent fee in addition to the consideration herein set forth.
10. All costs incurred by the applicants for the items submitted for this offering shall be the sole responsibility of the applicant.
11. The information contained in applications will be kept confidential to the extent permitted under the Freedom of Information Act (5 U.S.C. 552) and the Privacy Act (5 U.S.C. 552a).

**2013 MARGARET CREEK WILDLIFE VIEWING  
OUTFITTER AND GUIDE PROSPECTUS APPLICATION FORM**

In response to the invitation of the Ketchikan – Misty Fiords Ranger District, Tongass National Forest and subject to the requirements and conditions set forth in the Prospectus for commercial Outfitter and Guide Services at Margaret Creek Wildlife Observation Site, the undersigned offers the following bid:

A. **Maximum** number of service days requested:

B. **Minimum** number of service days requested:

C. Are you willing to accept any award of service days below the minimum number you have listed above: YES\_\_\_\_\_ NO\_\_\_\_\_.

Name and Address of Bidder:

Telephone Number: \_\_\_\_\_

Signature: \_\_\_\_\_

Title: \_\_\_\_\_

## **FORM A**

### **Criteria 1 – Services Offered to Customers**

Please provide information regarding the services you will be providing. The following information is not all-inclusive. Please add any information to your response that you feel is pertinent to the evaluation criteria. We will be looking for a range of services being offered to the public.

1. Provide an outline on the interpretive aspect of your guided tour which furthers the understanding and enjoyment of wildlife and natural resources at Margaret, and how your guided tour will balance the needs of the visiting public with the natural resource values of the area. Include ethical wildlife viewing aspects of your guided tour.
2. Describe how your tour will be structured. Include all aspects of your tour, including length of time on the trail, starting point, turning point, stopping points, group size, method of travel to the trail, etc. Include in your description any mitigation that you'll provide to alleviate conflicts with other guided groups and the unguided public during your tour.
3. What training do you provide to your guides and what qualifications do you require?
4. What will the client to guide ratio be on your tour?
5. What type of equipment will you provide to your clients for the activity? (rain gear, rubber boots, etc.)
6. What type of watercraft or aircraft will you utilize on your tour? What is the capacity and size of the craft? What are your maintenance standards? Applicants must demonstrate that the equipment and accessories proposed for use in the operations are safe and adequate for general public service relative to the specific activity, i.e. outfitting/guiding in various conditions found in Southeast Alaska.
7. Describe any/all provisions you will have for providing opportunities for physically challenged individuals to participate in your guided tour. What provisions will you have in place for accommodating non-English speaking visitors?
8. Provide an outline of your business plan that describes how you intend to use the service days you are requesting. How does Margaret Creek wildlife viewing fit into your business plan? Provide any business planning documents that support your response.
9. Please provide an estimate of your client fees for the life of this offering (each year for the 5-year period, 2014 through 2018).

**FORM B****Criteria 2- Ability to provide a safe outfitted or guided experience to visitors.**

Describe your background, training, and experience in providing safe outfitter/guide services. Include documentation that will support information provided. Provide as much detail as possible on quantity and quality of training including, but not limited to, dates, duration, affiliations, and references. Include information regarding the following:

1. Describe emergency medical training and/or first aid training requirements for all employees (guides).
2. Describe emergency rescue training and procedures.
3. List safety and first aid equipment/supplies that will be available on the guided tour or transport vehicle, e.g., radios, blankets, life vests, first aid kits, etc.
4. List any training or certification requirements that your employees must have for operating water/aircraft that are used in your operations. This should include training requirements instituted by your company and any local, state or federal requirements.
5. Describe your experience and the safety procedures you follow when outfitting/guiding in bear inhabited areas. If guides carry firearms, describe the training and certification program.
6. Describe any safety instruction you provide clients.

## **FORM C**

### **Criteria 3 - Experience and qualifications of the applicant**

1. Provide information on past experience complying with any local, state, or federal permits. Please state specifically if you have operated under a Forest Service special use permit on National Forest System lands, which Forest Service office administered your permit, and the terms of your permit(s).
2. Consideration will be taken regarding an applicant's previous performance while operating under these permits (i.e., compliance with terms of permit, prompt fee payment, reasonable record keeping and reporting, etc.), including applicable Performance Evaluations and other pertinent documentation.
3. Personal and business references will be contacted to verify qualifications and experience levels relative to the proposed use. Please submit two personal and two business references. Note: Additional contacts may be made, other than those submitted. All information derived from such review is confidential and is for official use only.
4. Provide a description of your past performance as an outfitter or guide. Emphasis should be on experience in Southeast Alaska or similar conditions. Specifically describe your experience outfitting/guiding at wildlife viewing areas. Discuss your knowledge of local operating conditions and standards for operating at Margaret Creek Wildlife Observation Site. Include copies on your two most recent performance evaluations specific to operations on National Forest System lands.
5. Describe your resource stewardship ethics and how those affect (or have affected) your behavior as an outfitter/guide at Margaret.



**FORM D****Criteria 4 - Sustainable Economics/Local Economy**

1. Describe how your business supports the local economy of the Ketchikan area. Does the revenue you receive and taxes you generate help sustain the local economy? What percentage of your revenue stays in the Ketchikan/Southern Southeast Alaska economy? How does your business support other local businesses?
2. Describe any other ways that your business and employees contribute to area communities.

## **FORM E**

### **Criteria 5 - Financial capability**

1. Applicants must complete the attached Financial Statement, Form FS 6500-24, (Appendix E) providing the past three (or most recent) years of financial history. The form must be notarized. If your financial statements are already prepared by an independent firm or certified by a CPA, they can be used in lieu of filling out the FS 6500-24. If you have not been in business for at least three years, provide the financial information for the years you have been. Financial statements are secured in confidence and are not public information. Applicants must state if they want their financial information returned to them.

Please attach this sheet to the face of your completed Financial Statement form FS 6500-24.

## PANEL INSTRUCTIONS

### Guidelines For Numerical Ratings

Each member of the evaluation panel will rate each applicant's response to every criterion with a score of 1 to 10 with 10 being the highest score. The following descriptive list defines **scores** for greater consistency between evaluators.

- 1 No experience/qualifications or information provided.
- 3 Applicant answered the criteria in a weak manner (the response is not complete), or the qualifications are weak, leaving you with too many questions, concerns, or need for clarification.
- 5 Applicant addressed each criterion in a manner which is complete (it is complete in the sense that the criteria are addressed, but there are still questions that could be answered). Because of this, you could reasonably feel that the applicant would be marginally acceptable and in practice would require close administrative scrutiny.
- 7 Applicant has fully addressed the evaluation criteria. They have demonstrated that they have experience/qualifications and the potential to perform at a level that will provide a good visitor experience. The applicant appears to be fully "up to speed."
- 10 Applicant has outstanding experience and qualifications. They fully demonstrate that they meet the evaluation criteria, and will provide the extra effort and creativity to make this a viable, satisfying experience for the visitor.

Scores for each criterion will then be multiplied by a coefficient to reflect the different weight given to each criterion, with a total possible score of 100 points. The evaluation criteria are listed in descending order of importance and the weighting will be as follows:

### POSSIBLE POINTS

Criterion 1 will receive a weighting of 4 times the score assigned.	30
Criterion 2 will receive a weighting of 3 times the score assigned.	30
Criterion 3 will receive a weighting of 2 times the score assigned.	20
Criterion 4 will receive a weighting of 1 times the score assigned.	10
Criterion 5 will receive a weighting of 1 times the score assigned.	<u>10</u>
<b>TOTAL POINTS</b>	<b>100</b>